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AUTHOR Richardson, Clyde M.; Eckard, Melvin L.
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ABSTRACT

The guide is intended to assist Extension Service Supervisors plan and carry out activities to help their subordinates adjust to new jobs and become meaningfully productive as soon as possible. Modification to fit specific requirements is recommended. The orientation process is described, and its seven phases are treated separately: personal needs; office orientation; meeting people; the organization; position, job, duties, and roles; program development; and professional improvement. Checklists of items to be discussed or explained are included, along with suggested activities for the new employee and suggestions for the supervisor. Recommended readings are listed separately and at appropriate sections throughout the guide. Appendixes cover duties of subject matter specialists and county extension staff, problem solving functions of the extension professional, and score cards for evaluating meetings and circular letters. (MS)

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COOPERATIVE EXTENSION SERVICE
COLORADO STATE UNIVERSITY
FORT COLLINS, COLORADO 80521

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a supervisor's guide for the orientation of extension employees

CE 000 395

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PLEASE NOTE

This Guide is presented to _____ to use in the orientation of _____. Please feel free to use the check lists, make notes on any of the pages, and copy any parts you may feel necessary to make the orientation of the above named new staff member meaningful.

ED 083405

A SUPERVISOR'S GUIDE FOR THE ORIENTATION OF EXTENSION EMPLOYEES

COOPERATIVE EXTENSION SERVICE
COLORADO STATE UNIVERSITY
FORT COLLINS, COLORADO

Prepared by Clyde M. Richardson, Project Leader, Orientation Training and Melvin L. Eckard, Staff Development Coordinator.

November 1971
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FOREWORD

This Guide is intended to assist you as a supervisor in the Colorado Extension Service in planning and carrying out activities designed to help your subordinates adjust to their new job and become meaningfully productive as soon as possible. It is by no means complete. There are many items that you as a supervisor will probably want to modify to fit specific requirements of your planning unit.

The principles in this Guide apply as well to experienced Colorado Extension personnel transferring from one location or position to another though probably not in the same degree or nature of orientation as employees new to Cooperative Extension or personnel experienced in Extension but new to Colorado. The supervisor should feel free to change, add, or modify items and procedures outlined in this guide to fit the new individual, situation, or the staff.

Staff members or employees referred to in this guide include field and state staff. The term supervisor refers to anyone who has a line responsibility relationship with staff members.

Though the principles outlined here also apply, the procedures for hiring and training Colorado Civil Service personnel are somewhat different. EFNEP and other Civil Service personnel supervisors will need to refer to the EFNEP Handbook or Civil Service Handbook for specifics in hiring and training to those procedures unique to that system.

It is your responsibility as a supervisor to become familiar with the entire guide and its suggested activities before the arrival of the staff member.

It is also important that the supervisor become familiar with the companion guide "A Guide to Success in Extension for New Extension Employees." (See page 3.)

Sincerely,

L H Watts

Lowell H. Watts
Director,
Cooperative Extension Service

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A Supervisor's Guide for the Orientation of Extension Employees

Introduction

Orientation training is designed to help new employees, men and women, understand the new organization, their place in it, and the part they are expected to play in its work. Orientation training is needed, without exception, by every new person who enters an organization.

The new staff member:	When new persons start to work in an organization for the first time, they
is eager to know	are eager to know what sort of an outfit they are getting into, what they are supposed to do, whom they will work with, and the like. Their desire for knowledge
is receptive	and receptivity to training are possibly greater at this time than they may ever be again. They know they are ignorant, so to speak, and that their career depends on the acquiring of knowledge and skill. New persons feel a great
wants to be shown	need for being shown what to do and how to do it. They are likely to be more attentive, more open-minded, and more eager than established employees. What
is strongly influenced	the new man or woman learns in their earliest days in an organization most likely will remain indelibly fixed on their mind. People on the verge of retirement often refer to their first days in the organization, even after the passage of many years. These days seem to stand out clearly in their minds.

Newly employed persons want to succeed. This high motivation must be maintained while they are developing their abilities if they are to give top performance.

The first day is a red letter day for new employees. Everything that happens on this day, especially the fellow staff member's behavior they observe, affects their job attitude and their future performance. The impressions they gain of the Extension organization during their first weeks are likely to stay with them throughout their career.

The successes that they hope for and which others want them to have, are likely to come only when they:

1. Understand what is expected of them.

2. Feel that they are an important part of the Extension Service--"that they belong."

3. Feel secure in their work.

4. Receive recognition for their efforts.

When these conditions are present, new employees will utilize more fully their capabilities and strive to improve themselves in an effort to get more satisfaction from their work. The purpose of orientation-induction training is to bring about these conditions during the first year of the individual new staff member's employment.

Responsibility

Every individual in the organization, at some time, will have the opportunity to help the new person. However, the supervisor must assume full responsibility for the training of the staff. This does not mean the supervisor does all the training. The supervisor is responsible for seeing to it and providing situations in which effective training can take place. The supervisor is expected to know the individual staff member's needs and to provide opportunity for the expression of these needs so that training can be provided. Needs to be met by training may be recognized as personal and common needs of the staff.

The immediate supervisor may call upon other people in the organization as needed.

In general terms:

- Specialists can be called upon to assist new county or area staff with subject matter information and situational data.

- County or area staff may be called upon to assist new specialists in identifying areas where the specialist can be of assistance.

- Organizational kinds of questions and help in obtaining assistance from others in the organization should be directed to the appropriate district extension director, coordinator, or assistant director.

What Type Orientation?

There are several schools of thought regarding orientation training. One is the "sink or swim" school where new persons or trainees learn as best they can as time passes. Management

specialists conclude this is a crude and wasteful way to learn. A second technique is the "send them out with Joe" school. This method can be successful and is useful but can be rather "haphazard" or "piece-meal" if not planned. The third school is the "systematic" school which stresses (a) that training should be planned, scheduled and carried out systematically; (b) it should be based on needs and wants of the individual as well as demands of the position; and, (c) the best known methods of orientation should be selectively used as they apply.

The process for orientation outlined in this Guide more nearly resembles the "systematic" school which allows for selectivity in the use of methods, timing and identification of needs as determined by the supervisor, his staff and the new staff member.

A Guide for Success in Extension for New Extension Employees

"A Guide for Success in Extension for New Extension Employees" is to be presented to the new employee (new to the Extension Service, Colorado, both or, if desired, the transfer reporting to a new position in Colorado) as soon as possible. (The first day on the job or even before.) This guide is designed with the same checklists as provided in the "Supervisor's Guide" as well as many of the suggested activities.

When using the two guides together in orientation, the "Supervisor's Guide" becomes an aid for prompting a keen alertness to the new person's needs by the supervisor, and the "Guide to Success" provides clues to the new employee for questions that will need answers. Two-way communication is a key to orientation and necessary if the new person is going to interpret the surrounding situation accurately and adapt to them in the most positive manner to be of use to the goals and objectives of the Extension organization. As mentioned in the introduction, it would be wise for the supervisor to become familiar with the contents of the "Guide to Success" as well as the "Supervisor's Guide" before the new staff member arrives. As guides, these two publications identify areas of knowledge needed by the new person, however they do not provide the facts and information needed. This is the responsibility of the supervisor.

The Orientation Process

The broad objectives for the orientation process are listed in a possible chronological order. However, this listing is for clarity only, because, realistically, it is not possible to satisfy each objective in this kind of order. Timeliness of new information is of utmost importance when providing help for a new person. When new workers have an expense account to be filled out, or when the first weekly CEMIS Activity Report is due, is the time that they are receptive and will remember the information provided. Irritation or dissatisfaction will probably develop if timely information is not provided. Conversely,

boredom could result when information is provided too soon (before the new worker recognizes a need for help).

The following objectives will be expanded in the sections of the guide that follow.

Phase I. Objective: To assist the new staff member with immediate personal needs.

Phase II. Objective: To assist the new staff member in becoming familiar with office and organizational procedures.

Phase III. Objective: To assist the new staff member in starting the process of meeting people.

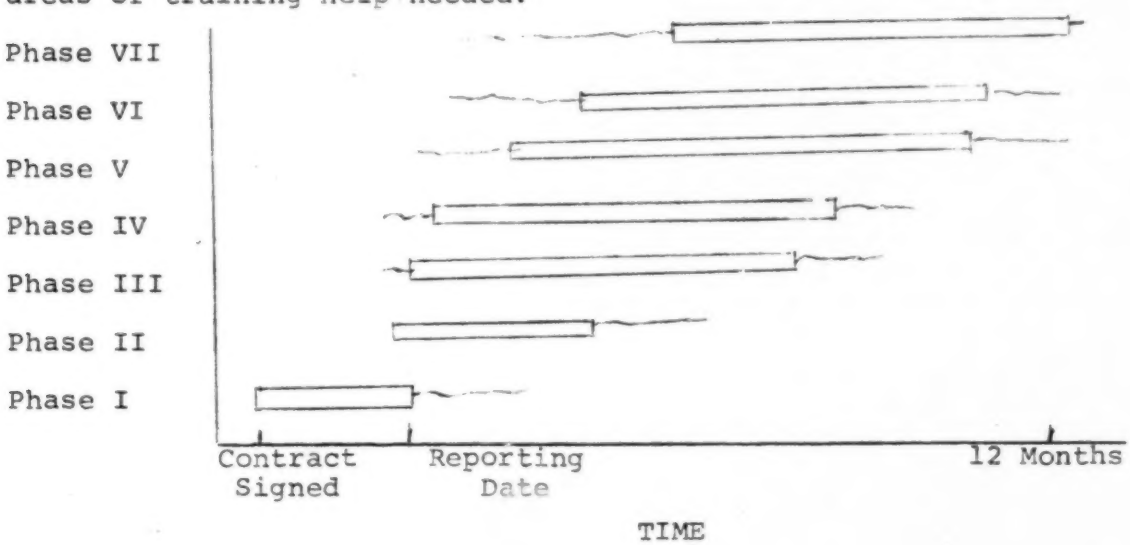
Phase IV. Objective: To assist the new staff member in becoming familiar with the Extension organization.

Phase V. Objective: To assist the new staff member in developing an understanding of the trainee's position, and the defining of the individual's job responsibilities, duties and roles that best suit the Extension organization, position, job and the new staff member.

Phase VI. Objective: To assist the new staff member in understanding the program development process.

Phase VII. Objective: To assist the new staff member in becoming aware of professional competence and continuous professional improvement opportunities.

It will not be possible to complete a phase before leading the new person into the next phase or next several phases. The diagram that follows may help the supervisor understand the somewhat artificialness imposed by using "phases" to identify various areas of training help needed.



The role of the supervisor in orienting a new staff member becomes increasingly complex, at least until the new person learns the ropes and becomes knowledgeful and self-directing. The first two phases suggest activities and information that are more specific, less open to interpretation and are necessary for every staff member. These should probably be covered within the first two weeks on the job. The supervisor will want to be continually conscious of the necessity to identify information needs of the new staff member and provide the material in a timely manner. This will require a conscious effort to maintain communication at a helpful level.

To avoid repetition and boredom in this part of the orientation the supervisor or a designated staff member will need to find out what the new staff member already knows or needs and wants to know. The supervisor may want to use campus personnel records as a beginning to understanding the new employee. Even so, consultation with the new person will be required as soon as possible.

In reality orientation starts when the potential employee first makes formal application for the position. Organization materials are provided those inquiring about employment as a result of their first contact. This first contact may be the result of a posted position announcement or personal inquiry. The amount and helpfulness of orientation at this point will depend on the applicant's "desire to know" and the individual's personal situation related to the application process.

Additional communication takes place during the hiring procedure. However, the amount of actual job orientation varies with the individual applicant and the hiring situation. In general, the following areas are discussed during the hiring process prior to the signing of the contract.

Personal

1. Housing possibilities
2. Recreation possibilities
3. Cost of living
4. Schools
5. TV reception
6. Child care

Organizational

1. The specific job responsibilities

    a. Scope, including physical and educational area
    b. Personal philosophies about the job (Extension) from the district agent and agent in charge, or department head and program coordinator or administrator.

2. Fiscal

    a. Specific salary
    b. Mileage and expense allotments (general)
    c. Employee benefits (general)

3. Visit to the job site.

   a. Office orientation
   b. Orientation of the town and surrounding office facilities (brief)
   c. Meeting of commissioners
   d. Meeting of secretaries and others available at the time within the office facility

Planning the Orientation

Up to this point in the process of hiring, the new staff member has only been a potential for a position. Upon acceptance of the position, the applicant becomes a member of a staff with a supervisor responsible for orientation training. As pointed out earlier in this Guide, this is not to say the supervisor will do all the training. The supervisor will probably do some of the training and delegate some to specialists, extension coordinators, administrators, and staff.

New staff members are individuals, differing in their dependencies on others for satisfying needs and wants, previous knowledge of Extension and eagerness to learn. Counseling may not always be possible before orientation especially in regard to personal needs the first few days of employment. The supervisor may have a responsibility for anticipating possible needs and wants based on previous meetings, employee records, etc. Counseling should begin as soon as possible and be maintained on a weekly schedule if feasible to the supervisor, the staff and the new member.

The supervisor, knowing about the arrival of a new employee on the staff, can now begin to develop a plan for orientation. The broad objectives (phases) are suggested for the supervisor to use in orienting the new person. Listed under these phases are possible information needs which the supervisor may want to consider in counseling with the new staff member.

Orientation of the New Employee Immediately Following the Signing of the Formal Contract

An orientation takes place following contract signing. Because of time availability and magnitude of the material, the orientation is brief, rapid, and to a degree, overwhelming. This means that this part of the orientation material, though given and explained to the new person, is probably not clearly understood and will need to be discussed again.

The information presented at the "contract signing orientation" is available for your review from the Extension fiscal office on the campus. Review of this information is suggested in Phase V Check List. The topics discussed were:

1. Contract signed by employee with State Board of Agriculture. (Copy is returned to employee after appointment is approved by State Board.)

2. Membership in the U. S. Civil Service Retirement System. (Circular and Certificate included)

3. Federal Employees Health Benefits Program. (Three circulars included) After enrollment the company sends an identification card and claim forms directly to employee.

4. University sponsored $20,000 (minimum) Group Life Insurance Benefit. (Brochure, Certificate, and Enrollment Card included)

5. Federal Employees Group Life Insurance. (Brochure and Certificates included)

6. $100,000 University Travel Insurance Benefit. (Card included)

7. Workmen's Compensation for Federal Employees. (Pamphlet included)

8. Faculty and Staff Manual. (Manual not included--mailed under separate cover)

9. Federal Penalty Mailing Privilege brochure. (Manual not included--mailed under separate cover)

10. Identification cards issued.
    a. U. S. Department of Agriculture
    b. Civil Defense (Issued only to Agent in Charge and appropriate specialists)
    c. Faculty Identification Card
    d. Employee Identification Card

11. Patent Policy. (Signed by employee, retained on campus)

12. Loyalty Oath. (Signed by employee, retained on campus)

13. Letters sent to new employee confirming salary, leave, and a letter from the Director explaining probationary period, if applicable.

Immediate Responsibilities

New people want and need meaningful responsibilities. They also need and want continuous guidance to ward off the confusing and misleading situations that can leave negative lasting impressions. It seems best to start the new persons out with one, two, or three specific assignments that seem to be within their knowledge, interest, and capability. Above all, avoid the "sink or swim" technique of orientation. Provide meaningful and significant tasks to be accomplished that are a part of the overall program. Give the new person the responsibility and authority to carry out the task after sufficient counsel and guidance. Many new employees relate that they began work one day, found themselves at 4-H camp the next, and have not slowed down enough since to really find out what this new organization and job is all about.

Immediate Responsibility Form (See following page)

This suggested form allows for recording the identification of an event or events, identification of specific assignments, dates, times, and details of the responsibility. Being specific about the assignment and identifying a minimum number of assignments should help avoid confusion and develop a feeling of responsibility. Provide ample opportunity for participation and discussion with the new person. The "immediate responsibility" process should be repeated until the new employee becomes self-directed. The supervisor may want to use the form in planning assignments related to activities suggested in the following pages. This method has been used and found to be helpful.

"Follow up" counseling will be appropriate following each event. The following questions may be helpful in these conversations.

1. How did you get along?
2. How could we improve this activity?
3. What programs did you run into that we should have discussed?
4. What questions do you have related to your responsibility, the activity, purposes, etc?

Date _____

Immediate Responsibility Outline

(Duplicate additional copies as needed)

Event or program _____

_____

_____

Assignments for new employee _____

_____

_____

Assigned by _____

Time and Dates		Assignment Details
Planned	Completed	

THE ORIENTATION PROCESS

Phase I. Objective: To assist the new staff member with immediate personal needs.

A multitude of personal needs and arrangements (many unidentifiable before hand) must be satisfied before the new staff member will be ready and able to give serious attention to the job. A supervisor or other staff member can and should assist with the many arrangements which must be made and problems attended to when moving into a new community. These arrangements are normally made between the time the new person is formally hired and the first day or two on the job.

The supervisor must use his own judgment in determining how far he should go in assisting the new person in making the move and getting settled. It should be kept in mind that the ease with which the new person (and family) become somewhat comfortable in their new surroundings and the quicker a feeling of security takes place, the sooner the new staff member will be ready to tackle the new job.

Materials Available for the Supervisor

Personal Needs Check List (See following page)

This check list is included as a reminder about the importance of the first reception and its relation to future attitude and performance.

PERSONAL NEEDS CHECK LIST

(For Supervisor's Use)

Date discussed or completed

1. New staff member's travel and arrival plans

_____ Sufficient communication so that both parties are informed about travel plans, moving arrangements and arrival schedule.

_____ Temporary or permanent housing available upon arrival.

_____ Arrangements for those "niceties" that will make the new person (and family) feel welcome

- _____ First meal
- _____ Meeting upon arrival
- _____ Transportation (if needed)
- _____ An attitude that says "we are happy to have you here"
- _____ Other (identify)

_____ Other (identify)

2. Permanent housing and associated arrangements

_____ Assistance in locating suitable facilities

_____ Utilities

_____ Telephone, mail, TV hookup (cable), etc.

_____ Newspaper

_____ Assistance with "moving in"

_____ Other (identify)

_____ Extension paid moving expenses

3. _____ Arrangements for local publicity (notification of newspapers, radio stations and TV stations about arrival)

4. Tour of area (employee and family) designed to point out:

   _____ Local churches, schools, stores, and public facilities

   _____ Historical points of interest, homes of associates, homes of local officials, etc.

   _____ Other (identify)

5. _____ Introductions (staff member and family) as needed and appropriate in view of situation.

6. Continuous attention to identify unexpected needs such as:

   _____ Financial assistance

   _____ School information

   _____ Child care

   _____ Other (list)

7. _____ Details related to starting work--where and when to report and other details

8. _____ Prepare new staff members office, making sure it is cleared, equipped and ready for occupancy

9. _____ Arrange for new staff member (and family) to meet work associates and families as soon as possible

10. _____ Other (identify)

Phase II. Objective: To assist the new staff member in becoming familiar with office and organizational procedures.

Office and/or organizational procedures are unique to every office and organization. All employees must eventually learn the "system," therefore, immediate orientation to procedures will speed up the adjustment to the job, avoid embarrassment, and make the new person more comfortable in the job. More time and attention to this phase of the orientation will be necessary if the new person is completely new to Extension, has never had a professional position or has never worked as a part of an office team.

Materials Available for the Supervisor

Office Procedures Check List (See following page)

The supervisor may want to use the Check List one of two different ways or possibly in a combination of ways. It may be used by the supervisor as a reminder of items to be discussed with the new person. The supervisor, however, may desire to give the Check List to the new staff member with the suggestion that the new person discuss the items with secretaries and others in the office. If the second alternative is chosen, no doubt the supervisor will want to double check with the new person to determine what areas have and have not been covered to the new employee's satisfaction. The supervisor may desire to keep a Check List along with the new staff member for a personal record.

ORGANIZATIONAL AND OFFICE PROCEDURES CHECK LIST

(This list is general in nature and will require greater specificity to fit a specific position; some items may not apply.) Be sure to explain who is responsible for what, where applicable, to avoid as much embarrassment as possible.

Date discussed or completed

_____ 1. Review of orientation program (what's going to happen during the orientation period).

_____ 2. Working hours.

_____ 3. Parking arrangements.

_____ 4. Keys for and general information about building, office, restrooms, storerooms, janitorial services, etc.

_____ 5. Coffee and refreshment arrangements.

_____ 6. Telephone procedures, placing long distance calls, Denver line, credit cards, etc.

_____ 7. Handling incoming and outgoing mail (times, procedures, who, where).

_____ 8. Special funds (coffee, flower, courtesy, petty cash, etc.).

_____ 9. Staff meetings (dates, times, location, responsibilities).

_____ 10. Penalty mail requirements and responsibilities.

_____ 11. Secretarial responsibilities and procedures (preparing letters, filing, work priorities, etc.)

_____ 12. Interoffice communication (routing mail, keeping supervisor informed, keeping office informed about schedules and location, teamwork).

_____ 13. Office budget and travel allotments.

_____ 14. Salary procedures (salary increases, performance evaluation, job counseling, professional improvement opportunities).

_____ 15. Special procedures.

_____ Probationary period

_____ Requests for leave (Official, Annual, and Sick)

_____ Tenure policy

_____ Travel approval

_____ Monthly itinerary

_____ CEMIS Activity Reports

_____ Plan of Work

_____ Narrative reports

_____ Field reports

_____ Specialist requests

_____ Expense account

_____ Ordering audiovisual aid equipment and other materials and equipment

_____ Obtaining and using state cars (state staff only)

_____ Other reports and procedures _____

_____

_____

_____ 16. Purchasing supplies and materials.

_____ 17. Office privileges and/or policy.

_____ Beauty shop, dentist, doctor, barber, etc.

_____ Personal errands

_____ Use of sick leave and annual leave

_____ Compensatory time (as a result of night work or weekend work)

_____ Outside personal activities (moonlighting, public behavior, community involvement)

_____ Official holidays

_____ 18. Filing system.

_____ Explanation of office system

_____ Suggestions and help in developing a personal system

_____ Review of Filing Manual

_____ A "spring housecleaning" may be in order

_____ 19. Explanation and use of available office and audiovisual equipment.

_____ 20. Office, building, grounds and area tour (should include areas significant to the new employee and the Extension office, with as many introductions as possible)

_____ 21. Mailing lists.

_____ 22. Other (identify)

Phase III. Objective: To assist the new staff member in starting the process of meeting people.

The job success hoped for by all new staff members may well depend upon the speed and degree to which they get acquainted with those "others" who are key to their job. Two steps are necessary:

- identification of "key people as determined by the job responsibilities and the situation; and,
- a systematic attempt by the new person to meet the people identified as "key."

Assistance to the new staff member will vary according to the individual's dependency on others for introductions. The supervisor can assist by:

1. Providing the new person with prepared lists of people to be met.
2. Helping the new staff member establish priorities (meeting everyone will require a great deal of time).
3. Going with and introducing the new person to individuals, at least in the beginning. (Supervisor or designated staff member)
4. Consultation with the new person from time to time related to their progress in making the agreed upon first contacts.

Meeting people is a continuous, and for the most part, natural process throughout the orientation period and those met will not be limited to the lists prepared at the outset. It will help the new staff member if a list of people met is kept. Such a list may be a future aid in remenbering names of clientele and potential clientele.

Materials Available for the Supervisor

On the page that follows you will find two outlines that identify categories of people that may be key for a new employee. These may be used as guides in identifying specific individuals for the new person to meet and in developing check sheets. There are separate outlines for campus personnel and county or area personnel. The supervisor may wish to keep a duplicate list of people that can be kept current as the new employee proceeds with the "getting acquainted" process.

An Outline for Getting Acquainted With People Who Are Key

The following outline is intended as a guide for the development of a check sheet containing the names of people to be met by the new staff member. The resulting listings of people should include the name, why important to Extension, and a space to indicate the date they are met.

Area or County Personnel

1. Elected officials (Legislators, Commissioners, Mayors, City Councilmen, Assessors, Sheriffs, School Board Members, etc.).
2. Advisory Committee Members (CSU Council Members, Resource Development Groups, Commodity Organizations, Youth Council Representatives, Extension Homemakers Organization, etc.).
3. Chamber of Commerce (Officers and Manager).
4. Government Agency Representatives.
5. CSU and Extension Personnel (Specialists, Program Leaders, Administrative Officials, Other Faculty).
6. Church Groups, Service Clubs and Community Action Groups (Officers and Leaders).
7. Extension Program Officers and/or Leaders not included in above.
8. Other.

Campus Personnel

1. Campus Extension Personnel (Director, Assistant Directors, Program Leaders, District Agents, Specialists).
2. CSU Faculty (Deans, Department Heads, Key Faculty).
3. Physical plant staff (motor pool, etc.)
4. Advisory Committee Officers
5. Field Staff (Contact Agents, Area or County Specialists, Agent Association Officer, Sub-district Officers, etc.)
6. Other

Phase IV. Objective: To assist the new staff member in becoming familiar with the Extension organization.

It is not realistic to expect a new person to understand or know all that is presented and discussed in Phase IV. It is possible however, to introduce many ideas that will prompt the individual to ask questions and seek additional information when needed concerning the organization, you and your staff's philosophies in connection with the various facets of the organization.

Materials Available for the Supervisor

Organization Information Check List (See following page)
(Reference materials are identified with Check List items.)

Completion of this Check List will require a great deal of time in reading and discussion. This should be recognized and planned for in the activity calendar of both the new staff member and the supervisor.

Evaluation

Continuous checks should be made to determine progress with suggested reading. The new worker should become increasingly self-directive in conducting program activities and in seeking answers to questions. If this is not evident, the supervisor may want to spend additional time exploring needs with the individual.

ORGANIZATIONAL INFORMATION
CHECK LIST

(For use by supervisor in providing orientation and training materials)

Date discussed or completed

_____ 1. Review organizational materials received at contract signing to determine misconceptions and clarify questions. This information was covered at the time of contract signing, but there may be questions. Material and information included: faculty appointment, health benefits, life insurance, ID cards (faculty, federal, Civil Defense) Workmen's Compensation, W-4 forms, retirement program, salary, leave (annual, sick, without pay, special study, sabbatical, official) loyalty oath, and patent agreement. Unanswerable questions should be directed to the Extension Fiscal Office at Colorado State University. (New employees only)

_____ 2. Materials to be reviewed and subsequently selectively read by all new employees. (All are available in the office or planning unit.)

_____ Extension Handbook

_____ Faculty Manual

_____ CSU Resource Guide

_____ CEMIS Handbook

_____ Popular Publications for Colorado Residents and Annual Inventory of Available USDA Popular Publications

_____ Land Use Planning Handbook

_____ EFNEP Handbook

_____ 4-H Handbook

_____ Civil Defense Handbook

_____ Service in Action Handbook

_____ People and a Spirit

_____ EEO Affirmative Action Plans

_____ Civil Rights Affirmative Action Plans

_____ Other

_____ 3. *Extension Organization

- _____ Administrative structure and individual responsibilities
- _____ Organization of state specialists (program areas, department heads, etc.)
- _____ Contact agent groups (including youth Development and Home Economics Development Committees)
- _____ Sub-District Organization (committees and officers)

_____ 4. *Campus facilities (primary for state staff)

- _____ Publication preparation procedures
- _____ Publication distribution procedures, policies, and costs
- _____ Services provided by Educational Media (tour may be helpful)
- _____ Information Service

_____ 5. Review of Performance Counseling and Appraisal Guide

_____ 6. Resource materials common to the particular position or job responsibility (list and assist in locating)

_____ 7. Other

*Through consultation following or in conjunction with the reading in item 2.

Phase V. Objective: To assist the new staff member in developing an understanding of the trainee's position, and the defining of the individual's job responsibilities, duties and rolls that best suit the Extension organization, position, job and the new staff member.

In general, each phase of this Guide points toward helping new persons understand their job. The purpose for this Phase is to deal directly with the position, job responsibilities and tasks. It may be helpful to review the new staff member's involvements and discuss how these activities and responsibilities fit in with the activities of this Phase.

Suggested Activities for New Staff Member (Check List provided)

1. Read - Current planning unit Plan of Work
   Position description for the position filled by the new worker
   Job description of predecessor
   Position and job descriptions of others in planning unit
   Past year's Narrative Reports and success stories

2. Prepare Activities Calendar for the coming year (This will require consultation with other members of the planning unit--see suggested form.)

3. After reviewing position description, prepare a job description using the following outline.

   a. Name, title, position, location and date
   b. List the major program areas of responsibility
   c. List major duties and/or activities expected in the major program area
   d. List areas of joint responsibilities with other staff members
   e. List duties and/or activities expected in joint endeavors

4. Use the provided meeting and circular letter scorecards to aid in developing those necessary extension skills. (Appendix B)

Suggestions for the Supervisor

Aiding the New Employee in preparing the Activities Calendar and Job Description

Carrying out already planned program activities can be very difficult for new staff members who have not participated in the planning. Therefore, opportunity should be provided for new persons to put some of themselves into carrying out activities, but they may need help in relating a given activity to the total program. Discussions that will result

from the activities of preparing an Activities Calendar and a new Job Description can help a great deal in developing an understanding of job responsibilities and in communicating expectations of the supervisor.

Planned association with a more established staff member who has similar job responsibilities.

The arrangement referred to here has popularly been called the "send them out with Joe" school or the "big sister-brother" approach. Many new people automatically pick out a peer with similar job responsibilities for job discussion. This arrangement is helpful, should be encouraged, and has been very successful when formally recognized and arranged. It has been successful when:

a. the immediate supervisor has recognized the need for a peer as a consultant for the new staff member, communicated with both parties about the need and formalized the arrangement by asking the peer to assist the new person;

b. the supervisor has carefully selected the consultant on the basis of similar job responsibilities, compatible personalities and reasonable opportunity for communication with the new person;

c. the immediate supervisor has arranged for the necessary time, expense, and scheduling for the two individuals to meet and discuss programs and activities on a regular basis;

d. the immediate supervisor has encouraged and assisted the new staff member in preparing questions and items to be discussed with the consultant.

On-the-job problem oriented visits with other professionals in the organization

Sometime within the first six months on the job a problem oriented visit with other planning units in the organization is helpful. New field staff may want to visit the campus and key individuals who can be helpful in clarifying questions related to the job, assistance available, etc. Campus staff often find it helpful to visit field units to get a "feel" about how they can be helpful.

Such visits should be well planned, thought out and purposeful. The new person should have been in the organization long enough to have developed needs that cannot be easily answered by the immediate supervisor or other immediate staff.

The supervisor can assist the new staff member in the activity with the following:

a. Determine with the new worker the people and places to be visited.

b. Correspond with, or better, phone the people to be visited, set the date, place, and outline the objectives of the visit.

c. A campus visit might include development of a program with a specialist, program leader, district agent, or other campus personnel.

d. The field visit might involve other specialists, program leaders, or their supervisor or other persons assisting with the orientation, in planning and conducting a program from beginning to end in the field. This could involve more than one trip.

e. New workers might be encouraged to join together on a trip to the campus/field. In this case the supervisors involved can encourage the new workers to jointly generate their own campus/field orientation program. The supervisors should keep tabs on the plan so as to be able to evaluate the results of such trips. In other words, make sure the new worker groups outline their objectives before going and that the supervisor approves them.

The supervisor should avoid a trip or trips to the campus/field for the new staff member if they turn out to be sight-seeing trips or casual in nature. The following might be some broad objectives of campus/field visits.

a. To meet the correspondents (not a valid reason alone for the trip, but does happen).

b. To gain in depth orientation to state/field programming and philosophies.

c. To participate in practical application of program planning, including the conducting and evaluation processes of program planning.

d. To plan and participate in in-depth planned training programs based on needs, wants, and planned objectives of new workers themselves.

e. An opportunity for the supervisor and new employee to train together.

Special Reading for the Supervisor

Please turn to Appendix A and read the excerpts from Kelsey and Hearne, "Duties of Subject-matter Specialist" and "Duties of County Extension Staff." Also provided in this Appendix is

an excerpt, "Problem Solving Functions of the Extension Professional." Both have been adapted especially for this Guide. The supervisor will probably want the new employee to read these articles.

Supervisors may also want to discuss the following responsibilities related to organizational professionalism.

a. Professional associations

b. Professional image (appearance, behavior, attitude)

c. Office relations (loyalty)

d. Other (identify)

RESPONSIBILITIES
CHECK LIST

Date discussed or completed

1. Reading

   _____ Current planning unit plan of work

   _____ The new staff members position description

   _____ Job description of predecessor

   _____ Position and job descriptions of others in the planning unit

   _____ Last year's narrative reports and success stories

2. _____ Prepared activities calendar

3. Prepared job description.

   _____ Major program area responsibility

   _____ List of major duties and/or activities expected in the major program area (include responsibilities to program planning and advisory groups; organizations and commodity groups relevant to the position: i.e. Extension Homemakers and Farm organizations; and mass media)

   _____ Joint responsibilities with other staff members

   _____ List of duties and/or activities expected in joint endeavors.

4. Discussed:

   _____ Professional associations

   _____ Professional image (appearance, behavior, attitude)

   _____ Office relations (loyalty)

   _____ Other (identify)

ACTIVITIES CALENDAR

Dates and Times	Events & Activities	Location

Phase VI. Objective: To assist the new staff member in understanding the program development process.

This phase is intended to provide a guide for the supervisor to use in helping the new employee develop an understanding of the fundamental program planning process. This "process" is complex and in a realistic sense almost defies verbalization. Most attempts that have been reviewed for this Guide result in "write-ups" or descriptions that are so general that they are almost useless in communicating with new people. The difficulty involved in verbalizing the program development process may well be the factor that makes it possible for the organization to respond to local people oriented problems. This Phase attempts to outline some of the basic principles that should be helpful if understood by the new person. Since the development process is different in each planning unit, the "how we do it" must be communicated to the new person by the immediate supervisor.

The following ten organizational principles have been operative since Extension began 50 years ago. They provided for changes which have taken place in adaption to changing conditions, but the principles within which Extension operates have remained the same. It may be helpful to review these with your new staff member.

1. Extension is educational in program content and methodology, not regulatory or financial; thus, is administratively attached directly to the public university system and is a major part of it, rather than being attached to Federal or State government directly.

2. Extension is informal, noncredit education conducted primarily beyond the formal classroom, and for all ages. A variety of methods are used, extensive and intensive, with much emphasis on personal contact during the initiating stages of development with particular audiences.

3. Extension was established throughout the country close to the people, with local offices which are semi-autonomous units based on organization and planning with the people.

4. Broadly interpreted Extension functions to provide objective presentation and analysis of factual information for decision making by the people themselves; typically research based with free flow of communication between research, extension, and resident-teaching functions of the State university system, and also with the resources of the United States Department of Agriculture and other agencies, public and private.

5. Extension is people problem-centered and situation based. Extension education starts with helping people to identify and understand their needs and problems clearly and to work in solving them as they are in relation to their situation.

6. Extension is as broad as the economic, family living and community development problems of the people; including but also concerned far beyond agricultural production technology.

7. Extension is strictly a professional function manned by college trained personnel specifically qualified for their positions.

8. The human resource development of people, resulting from the processes of education involving the people, is considered an important result along with the results attained from the application of technological information.

9. Extension is cooperative, but not necessarily equal sharing of financial support between Federal, State and County or local levels. (In Colorado for 1970-71--Federal 33%, State 41%, County 23%, other 3%.)

10. Extension is cooperative, but not necessarily equal sharing of program development between Federal, State and County or local levels. (The locus of program control rests with local groups)

There are several confusing areas related to program development that you may want to watch for in conversations with your new employee.

1. Beware of confusion between such terms as goals, objectives, purposes, aims, etc. According to Webster they mean approximately the same thing. Additional confusion seems to develop when they are combined with such terms as: educational, short-range, long-range, teachers, learners, organizational, etc. In reality, whatever terminology makes sense to the individual should be used by that individual.

2. The concept of "levels of objectives" may be helpful in clarifying various organizational statements. The CEMIS system contains:

   National Objectives - broad in scope.

   State Objectives - identified as a part of one of the National Objectives, but made more specific for Colorado.

Planning Unit Objectives - are specific for the planning unit but fit under one of the broader State Objectives.

"People and a Spirit" and "Colorado State University Extension Service--Statement of Functions and Goals" are broad statements of objectives but, more technically, are statements of organizational directions that are useful in establishing planning unit priorities.

3. More clarity will result if the "Program Planning Process" is viewed as helping local people to make existing program activities more significant in view of local problems and the development of new activities that will assist in solving other local problems.

4. CEMIS (Colorado Extension Management Information System) was developed as a reporting system designed to provide all extension staff with facts for management decisions. It was not intended as a program planning system.

5. The CEMIS Plan of Work should identify those extension worker activities designed to assist local groups in the identification and solution of local problems as well as the activities that result from this process. With many organized groups, the function of the extension professional may be to provide data and information about their concern.

6. Program accomplishments are greater when those concerned participate in the analysis of situations, identification of problems, setting of priorities, planning (decision making), action, evaluation and reporting. The planned program that doesn't include the people affected is destined for failure.

7. Extension programs take into consideration race, creed, color and national origin of the clientele and strive to maintain a balance based on population and/or commodity ratio in identifiable geographic areas (Title IV of the Civil Rights Act of 1964).

Suggested Activities for the New Employee and Supervisor

Some principles of program development are discussed briefly here with some check list questions for the supervisor's use in assisting the new employee in developing and working within a program of their own. A great deal of time may be required in consultation with the new person in order to develop a reasonable and realistic understanding of the principles involved. In fact, an understanding of the program development process is a lifetime (total career) process that leads the professional into continuous study of the broad area of human behavior.

EXTENSION PROGRAM PLANNING PROCESS*

Program planning is viewed as a process through which representatives of the people are intensively involved with Extension personnel and other professional people in six activities:

-Studying facts and trends. i.e. Situation

-Identifying problems and opportunities based on these facts and trends.

-Making decisions about problems and opportunities that should be given priority.

-Establishing objectives or recommendations for future economic and social development of a community through educational programs.

-Determining and carrying out appropriate educational methods and evaluating progress toward objectives and accomplishment of goals.

A. Situation: It is very significant that existing situations be adequately studied. Factual data must be collected and correctly analyzed in order to identify problems that should be the basis for programs. Background information should include beliefs, attitudes, understandings, and knowledge about the economic and social situation. Situation information provides a benchmark or starting point for measuring change. People for whom programs are planned should be involved in the collection of facts, especially of a local nature.

Evaluation is applied to facts obtained for situation analysis. The facts are evaluated in line with established criteria. Some criteria are: facts must be accurate, adequate, current, and relevant. Facts should be analyzed and interpreted to be meaningful. The analysis of the situation information should justify the time that will be spent on the program in relation to other problems that may be identified and programs initiated.

B. Problems and/or Opportunity Identification: Problems and/or opportunities should be clearly defined and should be related to the situation as analyzed. Problems and/or opportunities selected for emphasis in an Extension program should be:

1. Significatn in terms of the number of people concerned
2. Important in educational content
3. In line with Extension's educational responsibility.

The problem should also be possible of solution.

C. Objectives: Objectives should be determined in line with problems. Objectives should be determined cooperatively by the people for whom programs are intended and Extension workers. Objectives should specify the kinds of behavior changes desired, the subject matter area in which changes are to be made, and who is to make the changes. Objectives should also be challenging, achievable, and

D. Methods: The purpose of the planning process is to determine information needs and to organize learning experiences (methods and techniques) that will give people the information they need. Appropriate methods and techniques in line with objectives are needed. It is easy to lose sight of objectives and use the various methods and techniques as an end rather than as a means of reaching a desired result or objective. We should continually ask ourselves "What is the purpose of this meeting, demonstration, news release, judging event, etc." The proper selection of the method is important.

E. Evaluation: The total program effort must ultimately be measured in terms of goals and objectives attained. Evaluation is measuring accomplishments or the desired change. Benchmarks must be used in measuring progress. Background or situational information would indicate where we are in any area of concern. Progress is measured by surveying the advance toward the achievement of our goals.

The following questions should be answered in determining priorities for programs the new workers are to be involved in.

1. Is this a legitimate job for Extension and why?
2. Who wants the problem solved and why?
3. What is the size (width and depth) of the problem?
4. What degree of importance has the problem (now and foreseen)?
5. What are the chances of success?
6. Who will benefit, and be harmed, by solving the problem?
7. What are the resources available? Will they do the job in total or in part?
8. Is additional outside help available? List.
9. Is our clientele capable of solving the problem without our help? Explain the reason for this answer.

*Prepared by Charles E. Nelson, District Extension Director
Colorado State University Cooperative Extension Service
November 1972.

Phase VII Objective: To assist the new staff member in becoming aware of professional competence and continuous professional improvement opportunities.

The new employee as with all extension staff is expected to exhibit professional competence and take advantage of opportunities for professional improvement. In reality, the reason for this Phase is to begin the new staff members continuous process toward increased competence through professional improvement. It is the responsibility of the supervisor to make information available that will result in continuous development of all staff members.

Suggested Activities for the New Employee

1. Read Sanders "Instruction in the Cooperative Extension Service" 1972.
2. Selectively read articles of interest provided in the Journal of Extension.
3. Others (selectively chosen by the supervisor and new employee as appropriate).
4. In consultation with the supervisor begin preparing a professional improvement plan.

Suggestions for the Supervisor

Using the check list provided in this section, and based on consultations with the new staff member, the supervisor and new staff member may begin identifying additional professional improvement and training needs. These identified needs may then be used to construct a professional improvement plan that will go beyond orientation training. Some of this additional training may be identified as additional reading while other training may be more complex and require workshops, summer schools or training leading toward advanced degrees. For more information on professional improvement and training information or opportunities, the supervisor may contact and consult with the Extension Service Staff Development Coordinator.

PROFESSIONAL DEVELOPMENT
CHECK LIST AND PLAN

The following is a check list which may be useful for the supervisor in consultation and analysis of the staff member's further professional improvement needs and interests.

Date discussed

_____A. The staff member exhibits implications for training needs in:

_____1. Specific subject matter (identify)

_____

_____

_____

_____2. Specific extension program philosophies

_____4-H and Youth

_____Community and resource development

_____Agricultural programs (specify)

_____Family living and nutrition programs (specify)

_____Other (specify)

_____3. Communications

_____4. Group processes (social action and problem solving)

_____5. Supervisory training (staff and office management)

_____6. Other (list)

_____B. The staff member has a prepared professional improvement plan developed with the aid of the supervisor and appropriate resource people.

SOME RECOMMENDED READINGS

FOR SUPERVISORS AND NEW EMPLOYEES

A People and a Spirit, Fort Collins, USDA/NASSULGC, Extension Study Committee, Colorado State University, 1968.

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Sanders, H.D., Instruction in The Cooperative Extension Service Louisiana State University, 1972.

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Van Dersal, W.R., The Successful Supervisor New York, Harper and Row Publishers, Inc., 1968.

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It is difficult to foresee every need, want, and situation that may arise during the orientation of a new worker. There will be special deadlines, special projects and duties, conflicts of personality and interest and special needs and wants occur during the orientation. The whole staff, including the supervisor, will find need to adjust as well as the employees for they will differ from the staff in their creativity and style of working. New employees need to be treated as individuals and adults. Yet, they need guidance and attention just as a space explorer going to a new planet needs mission control for guidance. Much of their orientation is on their own shoulders, but the responsibility of a rewarding, nonfrustrating and productive experience lies with the supervisor and the staff.

REPORTS AND RECORDS ON PROGRESS OF ORIENTATION

1. Weekly Activity Reports From Immediate Supervisors Employed by Extension

The supervisor, upon realizing a new staff member is coming, should prepare an addition to the Annual Plan of Work regardless of whether the trainee is new to Extension, the State, the Area or the position. Planning unit staff members specifically involved in orientation should be named in the "addition to the plan" along with a planned amount of time estimated to be needed in accomplishing orientation activities. Such activities might be: counseling, study time needed by the new person, touring the area and other "becoming acquainted" opportunities.

2. Progress Reports

It is difficult to prescribe a method of reporting that will fit all departmental, county, and area situations. It is important, however, to have communication between the Extension administrator and the department head, and between the district director and the county director regarding the orientation of the new employee, his/her progress, need for orientation "helps" and suggested changes or additions to the guide.

Most of this communication will take place during consultations. District directors or Extension administrators, however, may feel a need for a more permanent record of orientation and request such a report from the immediate supervisor from time to time. One such record will be required at the end of the one year probationary period.

3. Records

The check lists provided in the guide should be considered as a starting point for the supervisor in preparing check lists of his own to fit that particular orientation situation. These check lists should be used as orientation progresses and may be initialed or signed by both the supervisor and new employee. These completed and initialed or signed check lists, when filed in the immediate supervisor's office, provide a permanent record of orientation for that particular new staff member. District directors or Extension administrators may also desire a copy of these check lists for their records.

APPENDIX A

DUTIES OF SUBJECT-MATTER SPECIALISTS

In backing up the work of agents in counties and areas the subject-matter specialist group, is concerned with the improvement of teaching. Specialists view the whole program and relate subject matter to all the phases of program making and execution. Five broad groups of functions are performed by subject-matter specialists, namely: planning functions, training functions, direct teaching, field studies to increase the effectiveness of the work in their respective subject-matter lines, and preparation of teaching materials.

In order that the work of specialists may be coordinated to help solve problems involving one or more subject-matter fields, someone may serve as leader of specialists. Such a person bears the same relation to the specialists as supervisors of other groups in the service bear to the group they supervise. When there is more than one specialist in a subject-matter department, the head of the department or one of the specialists may be designated as program leader. His duties are largely planning and coordinating.

The following list of specific duties of specialists was prepared in part by summer-session extension classes:

1. Keeping state and county extension workers up-to-date with regard to the findings of science and their application to the solution of farm and home problems.

2. Serving as a bridge between subject-matter research departments and field extension workers; interpreting the results of research in terms of desirable farm, home and community programs.

3. Assembling and analyzing facts, clarifying problems in the subject-matter field, studying the status of his enterprise throughout the state and the nation.

4. Helping county and area personnel to develop sound county, area and community programs in which subject matter is correlated to best serve the interests of the people.

5. Assisting agents, county and area specialists in the effective use of teaching methods peculiarly adapted to the subject matter involved.

6. Backing up the county and area programs with suitable state-wide publicity, popular bulletins, form letters, motion pictures, film strips, slides, exhibit materials, and other teaching aids.

7. Making studies to determine successful and unsuccessful methods of organizing and conducting extension teaching in the particular subject-matter field.

8. Outlining measuring devices and procedures applicable to the subject-matter problems being attacked and assisting agents and area specialists in their use.

9. Handling direct teaching of people within the county or area in such a manner as to strengthen the position of the county or area staff member and enable him better to meet subject-matter problems arising after the specialist's departure.

DUTIES OF COUNTY EXTENSION STAFF

The county and area extension staff is by far the largest and the most important group in the Cooperative Extension Service. As the official representatives of the state land-grant institution and the U.S. Department of Agriculture, living in the county or area in daily contact with men, women, boys, and girls in actual life situations, the county or area extension personnel are in a strategic position to study the problems and serve the needs and interests of the people of the county or area. The duties of the county or area extension staff are legion, and he or she must be constantly alert to the social and economic changes that vitally affect the lives of the people. As extension is a voluntary form of education, the success of the extension professional is largely determined by the degree of confidence that people come to have in the local representative of the Extension Service.

The various kinds of county or area extension professionals perform similar functions. The following statement of duties outlined in part by extension classes are suggestive of the type of training that needs emphasis. It is a composite statement for all types of county staff members.

1. Represents the state land-grant institution and the United States Department of Agriculture in the county in carrying on an educational program to improve living.

2. Studies the county or area, its people, and its agriculture, family life and community ascertain its problems and possibilities.

3. Develops or aids in maintaining the necessary organization of people to help determine and carry out the county or area extension program.

4. Develops with the people of the county or area a long-time and current agricultural family life and community educational program based on the major problems and needs of individuals--adult and youth--and families.

5. Develops leadership.

6. Assists local organizations with their educational programs when their objectives coincide with the objectives of the county or area extension program.

7. Promotes friendly relationships and the coordination of activities of all agricultural and community life groups within the county or area.

8. Maintains a public office where all people may call, telephone, or write for information on all problems relating to agriculture, family life and community development.

9. Keeps informed regarding social and economic changes affecting the people of the county or area and keeps up-to-date professionally through attendance at conferences, reading participation in in-service training courses, and otherwise.

10. Develops interest and cooperation of various organizations and individuals in the solution of farm, home and community problems.

11. Assists local leaders by supplying supplementary material, visiting farms and homes, providing helpful literature.

12. Arranges for help of specialists and other resource persons.

13. Provides information to individuals and groups other than those regularly organized.

14. Helps evaluate work done by obtaining and analyzing records and preparing statistical and narrative reports for county, area, state, and federal use.

15. Encourages the interest and cooperation of various organizations and of people in the development of boys and girls through club work.

16. Assists people in the communities in the organization of local 4-H clubs, in the selection and training of local leaders, and in the development of programs.

SPECIALIZATION AMONG COUNTY AND AREA PROFESSIONALS

The composite statement above may be slightly misleading, for few extension professionals, if any, would ever be expected to do all these things. In fact, the trend seems to be toward specialization. As more personnel are available in each county or area the work can be divided along subject-matter lines. Furthermore, with the increase in different clientele there is more specialization on farms and in communities. Some large commercial farmers have been heard to say, "I can't afford to fuss with chickens or a home garden." This may be sound farm management for that man, but it may overlook the best interests of the family and children. Specialization has led some counties to cooperate in the employment of one man for poultry, floriculture, spray service, or individual farm management. Agricultural engineers are being employed on an area basis to help with mechanization of farms. Areas of concern also affect the total community requiring specialization in working with people in community problems as well as specialized facets of family life.

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PROBLEM SOLVING FUNCTIONS OF THE EXTENSION PROFESSIONAL

There are three major roles that professionals in the Extension Service perform: (1) As a learning specialist or instructor, (2) as administrator of training and development of staff clientele, and programs, and (3) as a contributor to organizational and clientele problem solving. Each of these three roles requires different skills and abilities, and the extension professional should be professionally prepared for all three roles.

The extension professional as a learning specialist position brings with it a need for personnel skilled in the ability to use learning theory and methods to meet training needs. The extension professional as an administrator may not have the time, inclination, or experience to be an active educator or learning theorist. Extension personnel as administrators may find themselves involved in utilizing skills of administration on such tasks as recruiting, coordinating, selecting and developing his staff team, and planning programs among other administrative duties.

The extension professional as a consultant to clientele and management is stressed as the most important role. The major need for this type of role is for training to be recognized, and used, as a valuable tool for management problem solving. Effective training is helping people "learn how to learn" from every aspect of out life.

The problem solving functions of the extension professional are based on his knowledge and skills: (1) The professional helps clientele examine organizational problems, such as a workshop for problem-identification in regards to the relations between the organization and its membership. (2) The professional helps clientele examine the contribution of training to these problems such as exploring with clientele how training in social action and communications might lead to problem solving. (3) The professional helps examine the long-range and short-range objectives of the training such as helping the clientele in refining objectives and setting goals. (4) He explores, with clientele alternatives to training-problem solving approaches. (5) He develops with the clientele, training plans based on the objectives, and developed with the aid of a steering committee rather than submitting an individually developed plan for approval. (6) The extension professional explores appropriate resources to implement the plan. (7) He provides consultation for the client on evaluation and review of the program. Evaluation must be in terms of problem solving and based on the current status of the problem not whether or not the clientele liked the program. (8) The professional explores with the client the follow-up steps necessary to reinforce problem solution. He encourages the client for example, to look at the

implications of the steps taken, and to assess the program at the present in terms of future action.

A continuum of consulting roles an extension professional will have in his helping relationship are: Position (1): He gives expert advice to the client. This he would do relating to the role of an expert in his field. Position (2): He persuades the client as to a proper approach. This may be a corrective active when based on his knowledge and experience, he believes the client is headed the wrong way. Position (3): He provides alternatives to the client. In this role, he is helping the client by providing more than one route to take. The extension professional is not an implementor but is more of a facilitator in identifying alternatives to the client for confronting the learning aspect of the problem. Position (4): He assists in the problem solving process. He doesn't get involved in content but acts as a consultant in helping the client maintain the quality of its problem solving. Position (5): He serves as a catalyst for the client's problem solving. In this position, the extension professional may only ask questions for the client to take into account as he strives to find a direction for action.

APPENDIX B

_____
Type of Meeting

MEETING SCORE CARD

Planning

Circle Correct Answer

Yes No 1. Was purpose for the meeting clearly understood by participants?

Yes No 2. Were participants involved in planning the meeting?

Yes No 3. Was agenda written out in detail prior to the meeting?

Yes No 4. Did participants receive the agenda before the meeting time?

Yes No 5. Was the meeting place selected suitable--airy, light and comfortable?

How could planning for this meeting have been improved?

_____

_____

_____

_____

_____

Meeting

Circle Correct Answer

Yes No 1. Did the meeting start on time?

Yes No 2. Did group members know each other or were they introduced?

Yes No 3. Was the purpose of the meeting clearly explained at the beginning of the meeting?

Yes No 4. Were participants involved in conducting the meeting?

Prepared by Melvin L. Eckard, In-Service Training Officer
Colorado State University, Extension Service May, 1965 E&T1

Page 2

Circle Correct Answer

Yes No 5. Were participants given a break with an opportunity for refreshments?

Yes No 6. Were all participants given an opportunity to voice an opinion?

Yes No 7. Did speakers use audio-visual aids?

Yes No 8. Were participants given written materials to take home?

Yes No 9. Did participants seem interested in the meeting topic?

Yes No 10. Did any unplanned for difficulties develop?

Yes No 11. Were definite decisions made by the group in regard to needed follow-up, committees named, dates set or changes in practices that needed to be made.

Yes No 12. Did the meeting close on time?

Could this meeting have been improved?

_____

_____

_____

_____

Evaluation and Follow-up

Circle Correct Answer

Yes No 1. Was the effectiveness of the meeting evaluated by the participants?

Yes No 2. Did those responsible for planning the meeting evaluate it?

Yes No 3. Was a public report of the meeting made to the press and radio?

Yes No 4. Is there evidence that changes were made by participants as a result of the meeting?

Yes No 5. In your opinion did this meeting accomplish its purpose?

How could the evaluation and follow-up from this meeting have been improved?

Circular Letter Title

CIRCULAR LETTER SCORE CARD

ITEM	GOOD	FAIR	POOR
Letter looks attractive, interesting and easy to read			
Gets attention through unusual or otherwise interesting approach:			
Caption or salutation appropriate and effective			
Cartoon or other appropriate illustration . .			
Opening sentence strong			
Letter seems important; tells people something they want to know. (Develops interest)			
Has "you" and "your problem" approach			
Arouses curiosity at outset			
Timely, deals with an immediate problem . . .			
Emphasizes importance of problem through reference to economic losses or other annoyance			
Letter well planned; interest of reader held throughout by good continuity:			
Adheres to definite purpose (one idea) . . .			
Simple sentences and short paragraphs make reading easy			
Complete and concise			
Clear and easy to understand and remember . .			
Technical words and phrases avoided			
If long, broken with interesting subheads . .			
News-story style followed			
Letter makes reader aware of problem and eager for practical remedy suggested			
Necessary facts well presented so that reader may decide wisely "Reason why" used effectively			
Suggestion used effectively			